

MEMORANDUM

TO: Roberto Canales, P.E.
FROM: Rachel Vandenberg
DATE: June 28, 2011
RE: Advisory Council Survey Summary

As an element of the Stakeholder Outreach plan of the North Carolina Maritime Strategy development process, an online survey of members of the Maritime Strategy Advisory Council was conducted between June 2 and June 17, 2011. An invitation email was sent to the 44 members of the Advisory Council requesting that they participate in the survey. Of those, 22 members responded to the survey.

The online survey tool utilized, surveymonkey.com, provides a number of tools for compiling results of the survey, including viewing responses by respondent and by question. For the purpose of this brief overview, the latter method was used.

Overall, the survey realized its intended purpose: the gather information from those directly involved in direct and indirect utilization of the North Carolina port facilities – both on-port and inland. Because the Advisory Council is comprised of broad-based representation throughout the port-related business sector, the responses captured a comprehensive non-statistical sampling of industry activities related to the NC ports.

Although it is difficult to summarize the array of responses received, a number of common elements emerge when evaluating the data. They are:

- The Advisory Council is comprised of members who cover most aspects of port-related industries, including importers/exporters, transportation, commodity, military and decision makers.
- Throughout the survey, lack of adequate infrastructure (roadway and rail), available funding for infrastructure improvements, and improving connections to/from port facilities were identified as major challenges facing the NC ports.
- Increasing the competitiveness of NC ports will require better coordination between port-related industries, government/agency support, increased/dedicated funding, reduction of total delivery time, increased port availability, reduced shipping costs and a deep water facility at Port of Wilmington.
- The pervasive message throughout the survey responses was that there are opportunities for making NC ports more competitive given a concerted and aggressive effort undertaken by all stakeholders of the NC port facilities.

To provide more information on the results of the survey, attached to this memo is a brief summary of each of the responses to the survey questions. If there is a desire for more information, please feel free to contact me.

As of June 23, 2011, there have been 22 respondents to the survey representing a broad array of stakeholder groups. This response represents a 50% response rate of Advisory Council members invited to complete the survey.

3. How would you best describe your interest/role in North Carolina's maritime and goods movement industry? (select one)

The majority of the 16 respondents to this question are from Trucking/Distribution (31.1%), followed by Agriculture (25%) and Shipping Lines (25%), Military (12.5%), and Non-agriculture Manufacturing & Commodities (6.3%). There were no respondents from Retail Shippers or Special Zones.

4. If you are a producer, manufacturer, or shipper of goods, what percentage of your freight is:

Of the 16 respondents to this question the results are as follow:

Imported internationally – one respondent at 70%, one at 60%, one at 30%

Exported internationally – three respondents at 20%

Domestic – one respondent at 80%, one at 60%, one at 50% and one at less than 10%

5. Do you have a role in determining what ports your organization uses/serves?

Of the 15 respondents to this question, 10 responded that they have a role; five responded that they do not have a role.

6. What issues does the study need to address?

There were 19 respondents to this question. Although myriad responses were received, the overriding issues identified by respondents were infrastructure (roadway and rail) limitations/non-existence, increasing competitive position, funding and exploiting opportunities in military and agriculture shipping.

7. What do you see as the biggest challenge for the Maritime Strategy?

There were 19 respondents to this question. Although myriad responses were received, the overriding issues identified by respondents were funding, of infrastructure, competition from other ports and politics.

8. Who can/should be engaged in industry stakeholder discussions?

There were 18 respondents to this question. The stakeholders identified by respondents are those targeted by NCDOT and the AECOM/URS/Eydo team. These include industry, shippers, agriculture, trucking, rail, military and general public.

9. Who do you feel would be important to include in the public involvement effort?

There were 17 respondents to this question. Answers reiterated the answers to question 8, above, with an added emphasis on local, state and federal regulatory agencies.

10. Would you be willing to facilitate small group workshop discussion(s) with other members of your industry?

Of the 17 respondents to this question, all expressed a willingness to facilitate a small group workshop.

11. What role would you like to play in public meetings?

Most of the 16 respondents to this question expressed that they would be interested in participating as an industry representative and being available for technical input.

12. If you are a transportation provider, shipper or receiver of goods, do you use North Carolina ports? Why or why not? What port facilities do you use in addition to, or instead of, NC ports?

There were 12 respondents to this question, but only nine offered answers to the question. These responses noted that the nine respondents do use NC ports, but also utilize other east coast ports. The main reasons other ports are used are cost, availability and geographic proximity to product origination locations.

13. What investments in NC maritime facilities, road and rail infrastructure to those facilities, or road and rail infrastructure to other regional port facilities would matter to you?

Of the 15 respondents to this question, the majority of answers noted that road and rail investments were preferred to both port facilities and other regional facilities supporting ports, including inland facilities.

14. Are there specific transportation bottlenecks or impediments that reduce supply chain reliability, cause delays, or result in increased costs that keep you from using NC maritime facilities?

There were 11 responses to this question. The following issues were identified: lack of rail and roadway infrastructure in general, specifically though Wilmington and Morehead City; frequency of ships and lack of capacity/space at ports.

15. Please rate in order of importance:

The 16 respondents to this question ranked the overall order of importance of these issues as follows (a weighted ranking system was applied for the purpose of this summary):

1. Total delivery time
2. Reliable travel time
3. Overall transportation cost
4. Highway access
5. Railroad access
6. Port handling cost

16. How do ports market to or communicate with you in your role in the industry? How do you learn about planned new maritime investments and their potential benefits and costs?

Of the 17 respondents to this question, the majority noted that they received communications from NCSPA. Other resources included industry gatherings/materials, websites, and newsletters. Six respondents noted that they do not receive direct communications.

17. Are there opportunities to develop synergy between imports and exports at NC ports?

Of the 15 respondents to this question responses included better synergy for container usage (matching/availability), organized discussions among industries, coordination between importer/exporters for loads/containers.

18. What non-infrastructure policies or institutional arrangements would support the profitable growth of NC ports?

Of the 17 respondents to this question the most common responses noted incentives, tax credits, public/private partnerships, and appropriations.

19. What do you see as the biggest opportunity to enhance goods movement and related economic benefits in North Carolina?

There are 18 respondents to this question, presenting a variety of suggestions for enhancing goods movement. In summary, these topics covered increasing capacity at the ports and on transportation modes, creating deeper channels at the ports to accommodate larger vessels, increasing connections via improved infrastructure at and to/from terminals, and maximizing opportunities for agriculture and military movement.